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Universal Dynamics

Manager, Advisor, Home | Plan | Manage | Deploy | Evaluate | Reward

Help

Manager Advisor Home

This topic: Customer 02 - Director, Customer Operations

Our people are our company. The knowledge, skill and drive of our employees are the key competitive advantages that ensure the continued success of the company. Your job is to make sure that all your employees are focused on meeting goals that directly align to corporate objectives.

PLAN your organization:
Assessing your current organization go >

REWARD your employees:
Awarding a bonus go >

MANAGE your organization:
Driving performance improvement go >

EVALUATE your organization:
Conducting a performance review go >

DEPLOY your plan:
Onboarding an employee go >

QUICK HELP

- Got the Performance Review Blues?
Click below for more info...
Conducting a performance review
- Need help planning raises for next year?
Click below for more info...
Giving a salary increase

DIRECT REPORTS

- Customer 04
- Customer 05

METRICS

- Visibility-to-plan
- Pipeline-to-plan
- Deliverables-to-plan
- Expenses-to-plan

All information on this Web site is subject to applicable law and regulations, as stated in the plan documents and other legal provisions. The material provided here is for informational purposes only. Where it may be necessary, the plan documents govern.

FIGURE 1

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics My Site Site Settings Help

Manager Advisor Plan Deploy Manage Evaluate **Reward** Authoring Publishing Administration Reporting AUTHORIA

All sources Shelley Moore - Product Manager

Awarding a bonus

Manager Advisor
Plan
Deploy
Manage
Evaluate
Reward
Authoring
Publishing
Administration
Reporting

19 Actions
Add Listing
Create Subarea
Upload Document
Change Settings
Manage Users
Manage Content
Manage Portal Site
Edit Page

20 Highlights Actions Tips

TABLE OF CONTENTS

- Company philosophy
- Policy snapshot
- Manager's role
- Legal considerations

22

Company philosophy

A competitive compensation program can enhance the company's ability to attract, motivate and retain the highest caliber talent. As performance is closely tied to compensation and other rewards, an effective bonus program recognizes employee contribution and encourages a high performance culture.

Related Information

a. Understanding the compensation program

Back to top

Policy snapshot

Our bonus plan is designed to motivate employees and reward individuals responsible for the overall success of the business.

Reviews are conducted semi-annually, in June and December. The associated bonuses are payable July 15th and December 15th.

The following criteria are used to determine whether a bonus is awarded:

- employee's individual performance against established goals
- the performance of the company as a whole
- relative performance contribution to the business (contribution level compared with peers and associates)
- the amount of bonus budget available to the department

Budget

- The salary committee determines the bonus budget.
- The bonus budget this year is 5% of base compensation.
- Senior management communicates the bonus budget to managers.
- Bonus recommendations should not exceed the budget for the department.

Back to top

Manager's role

It is your responsibility to:

- determine whether employees should receive a bonus award
- evaluate each employee fairly, based on clear, written objectives
- use the evaluation as a basis for bonus recommendations
- recommend bonus awards to Human Resources in a timely manner
- communicate the approved bonus award to each employee

Guidelines

- Keep bonus award recommendations within the budget for the department.
- Document performance successes and failures that may affect an employee's bonus.
- Provide performance feedback and explain the link between performance and bonus amounts.
- Ensure that your top performers are being rewarded appropriately.

Resources

- Compensation Philosophy Manual
- bonus policy

Back to top

Legal considerations

Clear and accurate communication of employee salary-related information, including increases and other rewards, must be conducted in a non-discriminatory manner. All compensation information must be treated as highly confidential.

Back to top

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☐ I have read this page and understand the content.

Acknowledge

24

FIGURE 2

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics

Manager Advisor Plan Budget Manager Database Rewards Autonomy Pathology Administration Reporting AUTHORITY

Understanding the compensation program

My Life: New Knowledge Help

ALL SOURCES

Shelly Moore - Product Manager

Navigation Advisor

Plan

Budget

Manager

Database

Rewards

Autonomy

Pathology

Administration

Reporting

19

TABLE OF CONTENTS

Company philosophy

Policy snapshot

Manager's role

Legal considerations

Company philosophy

Effective compensation programs reward and encourage peak performance, enable the company to recruit and retain top performers and reduce turnover. Universal Dynamics is committed to investing in employees and to achieving the highest return on that investment. Recognizing and rewarding top performers who consistently add value to the organization provides that return and promotes a high-performance culture. Our compensation program is closely aligned with the business strategy and reinforces the company's commitment to success.

32

34

36

Back to top

Policy snapshot

Compensation is an important management tool to further the goals and vision of the company. The company has several compensation options available for managers to reward employees. When determining the best reward a combination of rewards for each employee, managers should consider the employee's:

- performance
- value to the business
- role in the organization
- current compensation

Budget

- The salary committee determines the budget for salary increases and bonus awards and is responsible for communicating the information to managers by October 15th.
- This year's increase is 5.0% of base compensation, as of January 1st.
- Salary increases and bonus recommendations should not exceed the department budget.

Base salary

Base salary is compensation employees receive for performing their essential job functions. The company periodically evaluates base salary to be sure that it is in line with the marketplace and employees are being paid fairly. Managers must ensure that consistently high performers continue to move up in the salary range by receiving merit increases, typically on an annual basis.

Merit increases

Merit increases are performance-based rewards, typically awarded annually. They are not automatic or seniority-based. When determining merit increases, managers should carefully review each employee's performance compared to current base salary. Employees who consistently demonstrate high-quality performance should receive increases; low or poor performers should receive small or no increases.

Annual bonus

Bonuses are paid to employees based on achievement of specific goals. Like merit increases, annual bonuses are not guaranteed. Employees must meet their target goals and objectives to be eligible.

Bonuses provide an effective method for reinforcing a pay-for-performance culture. Since bonuses are designed to be motivational, employees should be provided quarterly updates regarding progress against established goals. Managers should ensure that their individual bonus pools are allocated appropriately to encourage, motivate and reward top performers.

Spot bonus

In addition to annual bonuses which recognize the year's accomplishments, bonuses can be awarded "on-the-spot" when an employee accomplishes something unique or outstanding. Spot bonuses provide an effective means of providing immediate recognition to employees who go above and beyond and accomplish a task that adds material value to the organization. A spot bonus is generally a cash award of \$500.00 or less. The presentation of the bonus should be personalized and the amount should reflect the level of achievement.

Promotional increase

Promotional increases recognize significant increases in job responsibilities. The increase is determined by the job grade for the new position and the placement of the employee's salary in the new range. An employee can be promoted at any time during the year. When determining the increase amount, managers should consider:

- current base pay
- time frame of the last increase
- current salary for others in the same position

Stock options

The goal of the stock option program is to encourage retention by providing employees with an ownership stake in the company and a potentially significant reward. A stock option award is appropriate for senior level employees who have a significant influence on business results. Managers should use stock options to continue to motivate and retain these employees as key contributors to the company's success.

Cash certificate

Cash certificates provide a quick and easy way to instantly recognize and reward employees who exceed expectations to accomplish goals outside their normal job responsibilities. Rewarding this type of behavior encourages and motivates other employees to perform at a higher level. Cash certificates range from \$100.00 to \$500.00. Non-cash awards avoid the pricing or compensation and tax issues raised by the use of cash.

30

Back to top

Manager's role

It is your responsibility to:

- know and understand the variety of compensation options available to reward, motivate and retain top performers
- be aware of the philosophy behind each option and its intended performance result
- support the company's pay-for-performance business strategy with prudent use of compensation options
- discourage poor performance by limiting salary increases and other rewards when performance is below standard

Sub-fallouts

- Ensure that employees fully understand all of the components of the compensation program, including the fact that merit increases and bonuses are earned, not guaranteed.
- Consistently reward high performance.
- Use the compensation option that is most appropriate for the situation.
- Compensate all employees fairly and equitably.

Resources

- Compensation Philosophy Manual
- Salary Administration Strategy Document

Back to top

Legal considerations

All decisions regarding employee compensation, including salary increases, bonuses and other rewards, must be made in a non-discriminatory manner. All compensation information must be treated as highly confidential.

Back to top

At Universal Dynamics, we are committed to providing a safe and healthy work environment for all employees. This document contains confidential information and is intended for use by managers only. It is not to be distributed outside of the organization.

I have read this page and understand the content.

At Universal Dynamics

FIGURE 3

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate **Reward** Authoring Publishing Administration Reporting

My Site Site Settings Help

Shelley Moore - Product Manager

Awarding a bonus - Actions

19

Manager Advisor
Plan
Deploy
Manage
Evaluate
Reward
Authoring
Publishing
Administration
Reporting

Actions
Add Listing
Create Subtree
Upload Document
Change Settings
Manage Users
Manage Content
Edit Page

TABLE OF CONTENTS

- Milestones
- Tasks
- Preparation

Milestones

In the table below, you will find a listing of critical milestones to meet as you award a bonus:

Milestones	Key dates
Human Resources conducts a bonus kick-off meeting.	November 3 and June 4
Distribute Self-assessment Form to all employees.	November 15 and June 15
Collect Self-assessment Forms.	November 20 and June 20
Complete a Goals Results Form for each employee.	November 20 - 25 and June 20 - 25
Submit initial bonus award recommendations to your department head and Human Resources for approval.	November 27 and June 28
Schedule a meeting with each employee to review performance and obtain a signed Goals Results Form.	December 1 and July 1
Communicate approved bonus awards to each employee.	December 15 and July 15
Bonuses are payable.	December 20 and July 20

[Back to top](#)

Tasks

When you award employees a bonus, you must:

- distribute to and collect from each employee a Self-assessment Form
- review employee performance as measured against goals
- complete a Goal Results Form for each employee
- submit initial recommendations to your department head and Human Resources to obtain approval for any proposed bonus awards
- schedule a meeting with each employee to review results
- provide Human Resources with the final Goal Results Form, signed by you and the employee
- communicate the approved bonus award to each employee

Determining the appropriate bonus amount

To determine the appropriate bonus amount for each employee, you should:

- measure the employee's progress against goals
- provide a percentage for "goal accomplished"
- calculate the total individual objective as a percentage
- compare the total individual objective percentage against the employee's bonus opportunity

Providing above average bonuses to top performers

If you feel that certain employees performed significantly better than others and deserve additional rewards, consider increasing their bonus award. To do this, you must:

- be sure the total bonus percentage is still within budget for your department
- obtain approval from your department head if the bonus is beyond the established range for an employee
- be prepared to document how the employee's performance and current responsibilities warrant the additional award

Providing no bonuses to poor performers

If you feel that certain employees did not perform up to standard, you may choose not to award them a bonus. Remember, bonuses are not guaranteed and are a reflection of an employee's performance. The decision not to award a bonus can be an appropriate and effective motivational tool.

If you do not award a bonus to an employee, be sure to:

- document the reasons why the employee should not receive a bonus (e.g., the employee is rated 2.5 or below)
- clearly explain what the employee needs to do going forward to improve performance
- enter zero dollars as a recommended bonus amount

To make bonus recommendations, use the Compensation management system.

[Back to top](#)

Preparation

To assist you in preparing for awarding a bonus, you may want to review:

- total compensation for each employee
- job grades and bonus opportunities
- annual budget

FIGURE A

[Back to top](#)

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Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics

Manager Advisor Home Plan Manage Deploy Evaluate Reward **Your direct reports..** Help

AB sources AUTHORIA

Your direct reports

Customer 02 - Director, Customer Operations

Manager Advisor Home

Plan Manage Deploy Evaluate Reward

Job Details

Employee ID	Name	Job Title	Performance Rating	Last Increase Date	Phone
EXTcust04	Customer 04	Team Lead, CCE	Unsatisfactory	1/1/2004	
EXTcust05	Customer 05	Team Lead, CCE	Exceeds Expectations	1/1/2004	

Vacation/Sick Time

Employee ID	Name	Personal Time	Vacation Time	Sick Time
EXTcust04	Customer 04	11	17	19
EXTcust05	Customer 05	20	22	34

Training Summary

Employee ID	Name	Training Course	Grade
EXTcust04	Customer 04	Conflict resolution for customer service	Passed
EXTcust05	Customer 05	Conflict resolution for customer service	Passed

FIGURE 5

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward **Authoring** Publishing Administration Reporting AUTHORIA

Authoring

Current Location
Manager Advisor
Authoring
Help

Actions
Create Subarea
Change Settings
Manage Security
Manage Content
Manage Portal Site
Add to My Links
Alert Me
Edit Page

Maintain event content 52

- Aligning with corporate goals
- Assessing your current organization
- Awarding a bonus 56
- Creating a career development plan
- Creating a performance improvement plan
- Conducting a performance review
- Creating a staffing plan 54
- Creating a succession plan
- Developing a salary plan
- Driving performance improvement
- Giving a salary increase
- Granting stock options
- Hiring an employee
- Identifying your optimum organization
- Managing a change in employee status
- Managing a complaint
- Managing a leave of absence
- Managing a reduction in force
- Managing a resignation
- Managing attendance
- Managing ongoing performance
- Managing the feedback process
- Onboarding an employee
- Promoting an employee
- Recruiting an employee
- Setting goals and objectives
- Staffing a position
- Terminating an employee
- Understanding the compensation program

Maintain configuration 60

Type Name

- Contact roles
- Employee groups
- Event types
- Links
- Substitution variables
- System variables

Maintain home page content 62

Type Name

- Home page content

Maintain index pages content

Type Name

- Index pages content

Maintain employee summary page design

Contacts

Last Name	First Name	Business Phone	Email Address
There are no items to show in this view of the "Contacts" list. To create a new item, click "Add new item" below.			

Maintain pictures

Maintain resources

FIGURE 6

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO MANAGERS

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting AUTHORIA

This topic

12

Current Location
Manager Advisor
Publishing

Actions:
Add Listing
Add Person
Create Subarea
Upload Document
Change Settings
Manage Security
Manage Content
Manage Portal Site
Add to My Links
Alert Me
Edit Page

1. Choose what you want to publish

☐ Publish All
☒ Publish Specific items

☒ Publish event content

Choose an event type: ALL

Available events	Selected events
Managing a reduction in force	Managing a resignation
Promoting an employee	Giving a salary increase
Driving performance improvement	Terminating an employee
Creating a staffing plan	Granting stock options
Creating a performance improvement plan	Conducting a performance review
Managing the feedback process	Managing a change in employee status
Onboarding an employee	Developing a salary plan
Hiring an employee	

☒ Publish page views

Choose an event type: Understanding the compensation program

☐ Publish other components

- ☐ Publish configuration
- ☐ Publish contacts
- ☐ Publish employee summary page
- ☐ Publish index pages
- ☐ Publish manager home page
- ☐ Publish pictures
- ☐ Publish resources

2. Choose where you want to publish

☒ Authoring Preview
(Server = http://evo-2k3-zb791; Area = /)

Testing Production
(Server = http://evo-2k3-zb791; Area = /)

68

3. Set Publishing Status

67

FIGURE 7

Universal Dynamics

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration Reporting AUTHORIA

My Site Site Settings Help

This topic

Administration

Current Location
Manager Advisor
Administration

Actions

- Add Using
- Add Person
- Create Subarea
- Upload Document
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

SharePoint administration links

- Manage users
- Manage site groups
- Change portal site properties
- Manage portal site structure
- Configure search and indexing
- Configure usage analysis processing
- Add new link

Authoria Manager/Advisor administration links

- Implementation configuration
- Application settings
- Trace settings and log
- Employee summary schema generator
- Compliance tracking reset
- Cache refresh
- Authoria customer connection

FIGURE 8

Applicant(s): Timothy Farlow et al.

PROVIDING PROGRAM AND POLICY INFORMATION TO
MANAGERS

Universal Dynamics My Site Site Settings Help

Manager Advisor Plan Deploy Manage Evaluate Reward Authoring Publishing Administration **Reporting** AUTHORIA

Compliance report This topic

Current Location
Manager Advisor
Reporting
Compliance report

This report lists the events for which compliance is required and specifies which managers have acknowledged reading the event content.

Event Name	Viewer Name	Viewer ID	Time Acknowledged	
Creating a staffing plan	Ken Hecht	781530208	3/23/2004 2:38:49 PM	Total : 1
Managing a leave of absence	Ryan Smith	781530207	3/23/2004 2:38:08 PM	Total : 1

Actions

- Create Subarea
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

FIGURE 9

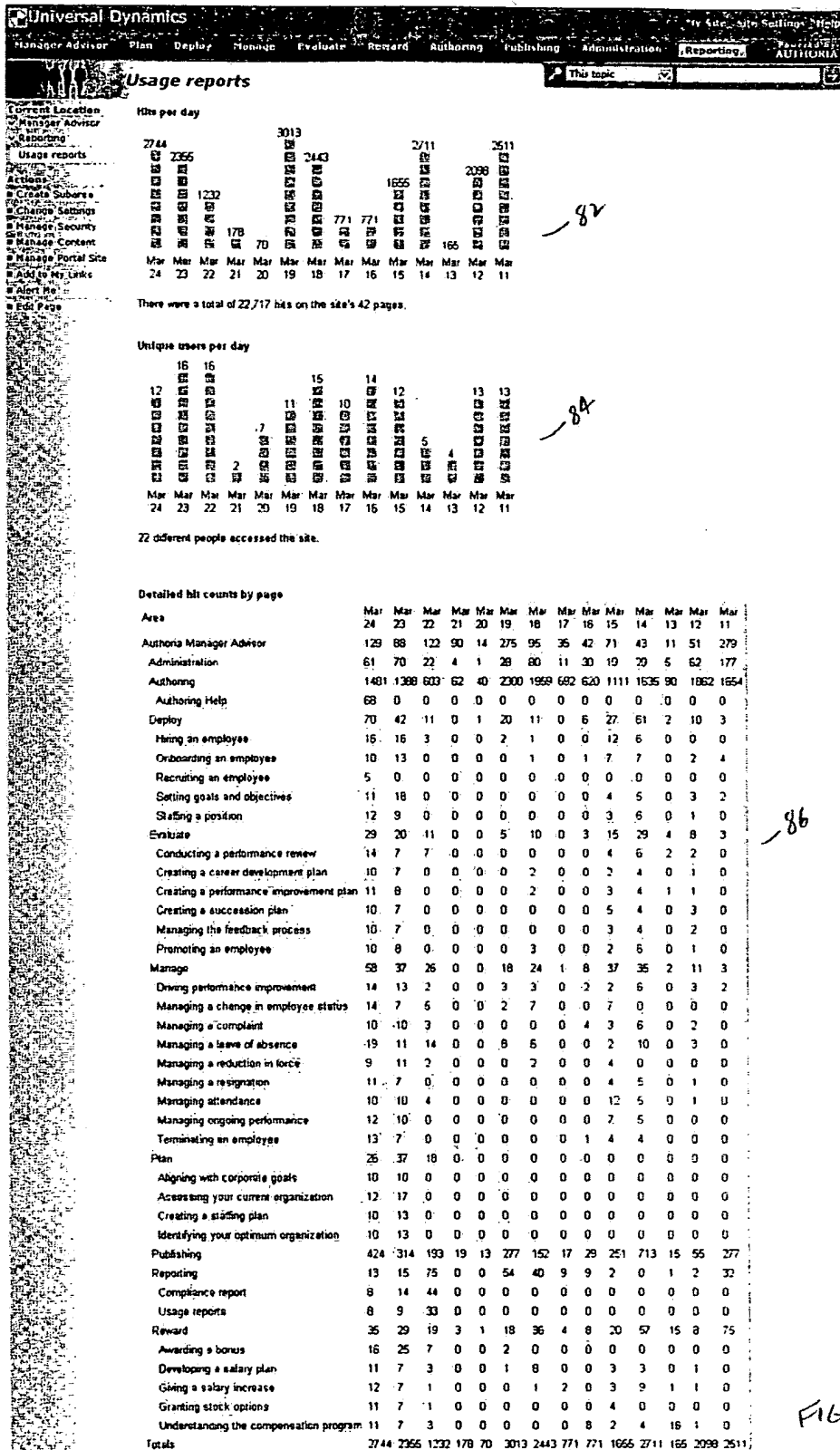


FIGURE 10

Substitution variables

Help

Substitution variables overview

A substitution variable can be used to substitute a value for another value in content that appears on pages. When configuring content, you can use brackets to delineate a variable whose value should be determined using this form. For example, if (employee) is used in content, the system will look for a variable ID named "employee" (case sensitive), and substitute the term in the "Value" column.

Variable ID	Description	Value
Company	Substitution variable for the word Company	Company
Companies	Substitution variable for the word Companies	Companies
Company's	Substitution variable for the word Company's	Company's
company	Substitution variable for the word company	company
companies	Substitution variable for the word companies	companies
company's	Substitution variable for the word company's	company's
Company name	Substitution variable for the word Universal Dynamics	Universal Dynamics
Company name's	Substitution variable for the word Universal Dynamics	Universal Dynamics
a company	Substitution variable for the phrase a company	a company
Department	Substitution variable for the word Department	Department
Departments	Substitution variable for the word Departments	Departments
Department's	Substitution variable for the word Department's	Department's
Department's	Substitution variable for the word Department's	Department's
Departmental	Substitution variable for the word Departmental	Departmental
department	Substitution variable for the word department	department
departments	Substitution variable for the word departments	departments
department's	Substitution variable for the word department's	department's
departments'	Substitution variable for the word departments'	departments'
departmental	Substitution variable for the word departmental	departmental
a departmental	Substitution variable for the phrase a departmental	a departmental
Employee	Substitution variable for the word Employee	Employee
Employees	Substitution variable for the word Employees	Employees
Employee's	Substitution variable for the word Employee's	Employee's
employee	Substitution variable for the word employee	employee
employees	Substitution variable for the word employees	employees
employee's	Substitution variable for the word employee's	employee's
employees'	Substitution variable for the word employees'	employees'
An employee	Substitution variable for the phrase An employee	An employee
an employee	Substitution variable for the phrase an employee	an employee
an employee's	Substitution variable for the phrase an employee's	an employee's
Career management system	Substitution variable for the phrase Career management system	Career management system
Compensation management system	Substitution variable for the phrase Compensation management system	Compensation management system
Human Resources management system	Substitution variable for the phrase Human Resources management system	Human Resources management system
Performance management system	Substitution variable for the phrase Performance management system	Performance management system
Staffing management system	Substitution variable for the phrase Staffing management system	Staffing management system
Time and absence management system	Substitution variable for the phrase Time and absence management system	Time and absence management system
Highlights	Substitution variable for the text of the Highlights tab	Highlights
Actions	Substitution variable for the text of the Actions tab	Actions
Tips	Substitution variable for the text of the Tips tab	Tips
Company philosophy	Substitution variable for the text of the Company philosophy section header	Company philosophy
Policy snapshot	Substitution variable for the text of the Policy snapshot section header	Policy snapshot
Manager's role	Substitution variable for the text of the Manager's role section header	Manager's role
Legal considerations	Substitution variable for the text of the Legal considerations section header	Legal considerations
Preparation	Substitution variable for the text of the Preparation section header	Preparation
Milestones	Substitution variable for the text of the Milestones section header	Milestones
Tools	Substitution variable for the text of the Tools section header	Tools
Tasks	Substitution variable for the text of the Tasks section header	Tasks

FIGURE 11

Applicant(s): Timothy Farlow et al.

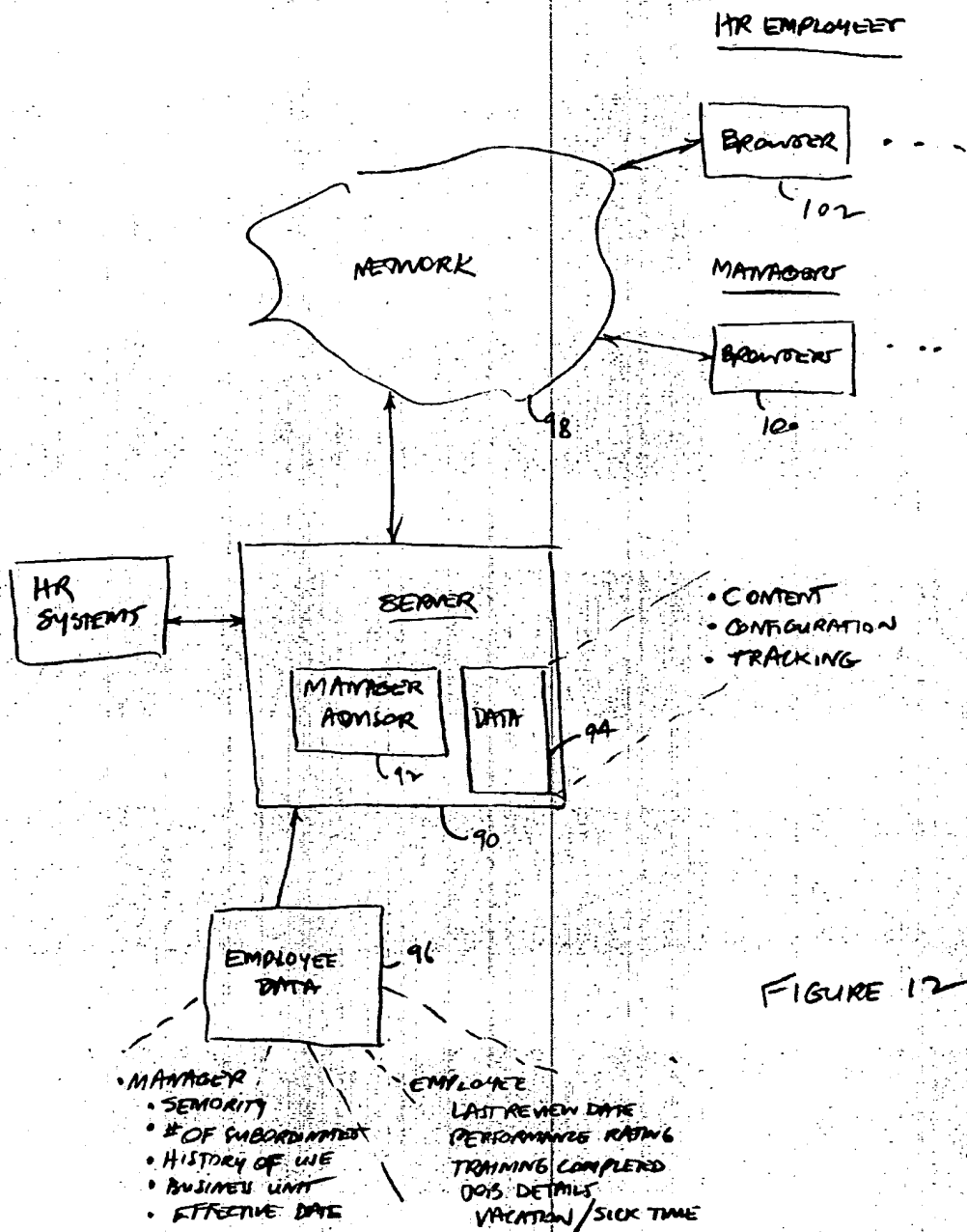
PROVIDING PROGRAM AND POLICY INFORMATION TO
MANAGERS

FIGURE 12